choose and book

NHS

End User Manual for Web-Based Referring General Practitioners (GPs) for Choose and Book R2.2

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Choose and Book Programme

End User Manual for Web Based Referring GPs for Choose and Book R2.2

Welcome to the End User Manual for web-based referring GPs for Choose and Book R2.2

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2 Background to Choose and Book

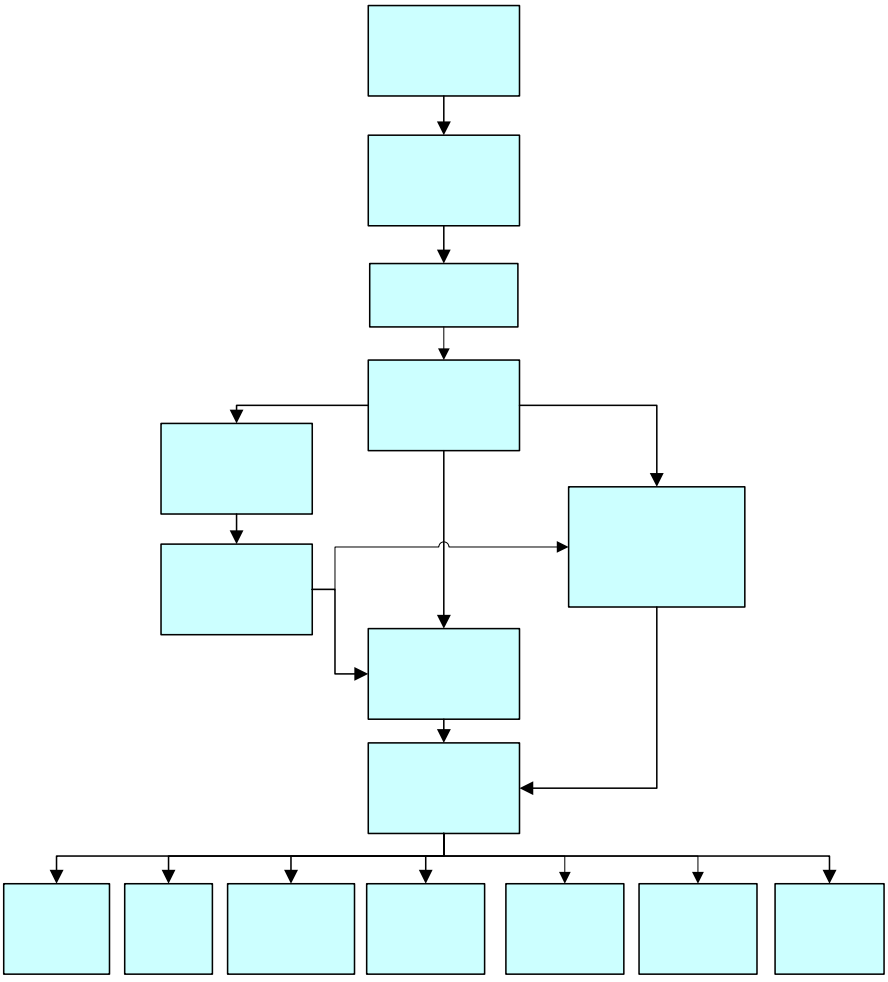
Choose and Book is the nationally commissioned system built by Atos Origin to provide the NHS with an electronic booking and choice tool. Choose and Book first went live in 2004, and is now at release version 2.2 (R2.2), which went live at the end of September 2005.

Choose and Book enables a patient to choose where they wish to attend for an outpatient appointment from those commissioned by their Primary Care Trust (PCT), and make a booking of a date and time of their choice, from those available.

This end user manual sets out the functions that a General Practitioner (GP) or referrer can perform in Choose and Book as a 'web-based referrer'. 'Web-based referrer' means that the GP accesses Choose and Book via the NHSnet (or web), and not via their local GP system.

Choose and Book enables a GP to refer and book a patient to a service commissioned by their Primary Care Trust (PCT), and to send an electronic referral letter with that referral or booking.

The functions that a GP can do in Choose and Book when completing a referral and booking are:



3 Accessing Choose and Book with your Smartcard

3.1. *Using your Smartcard*

⇒ A Smartcard looks much like a credit card, with a picture of the user, together with their Unique Identification number (UID) and a gold chip where all the information is held.

⇒ To access Choose and Book, you should already be logged on to your computer, so you see your desktop on your screen

⇒ Put your smartcard into the smartcard reader

⇒ The Gem Authenticate box appears

⇒ Type in your PIN number (also called passcode) and click on OK or press return on the keyboard

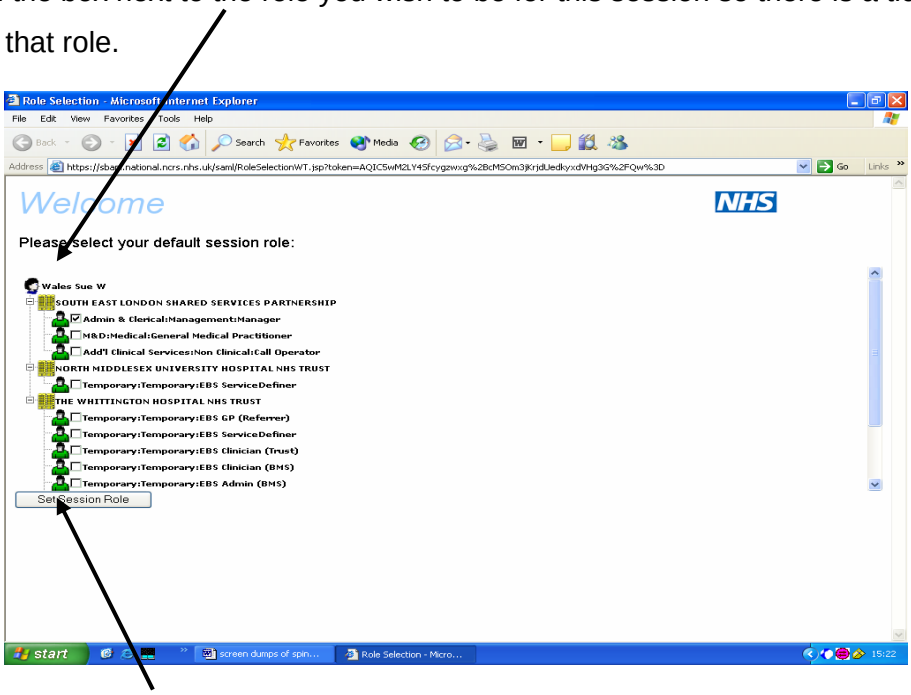
⇒ You may (or may not, depending on local set-up) now see a security alert.

Security Alert
Information you exchange with this site cannot be viewed or changed by others. However, there is a problem with the site's security certificate.
The security certificate was issued by a company you have not chosen to trust. View the certificate to determine whether you want to trust the certifying authority.
The security certificate date is valid.
The security certificate has a valid name matching the name of the page you are trying to view.
Do you want to proceed?
Yes
No
View Certificate

⇒ Click Yes to proceed

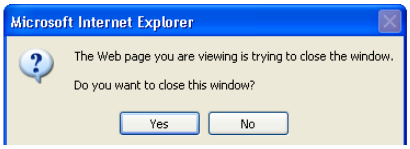
⇒ You then see a screen saying **Welcome** with the role(s) you have been allocated on the Spine.

⇒ Click in the box next to the role you wish to be for this session so there is a tick in the box next to that role.



⇒ Click on Set Session Role

⇒ Now the system asks if you want to close the present window. Click on Yes


Microsoft Internet Explorer
The Web page you are viewing is trying to close the window.
Do you want to close this window?
Yes
No

⇒ You are now returned to your desktop, having successfully logged on to the Spine.

3.2. *If you have a Choose and Book icon on your desktop:*

⇒ Double-click on the Choose and Book icon on the desktop to launch Choose and Book

⇒ Choose and Book sometimes takes a little while to check your authentication, and then if you have one Choose and Book Business Function the homepage will open; if you have more than one Business Function you will go to the Role Selection screen.

⇒ You have now accessed Choose and Book using your smartcard

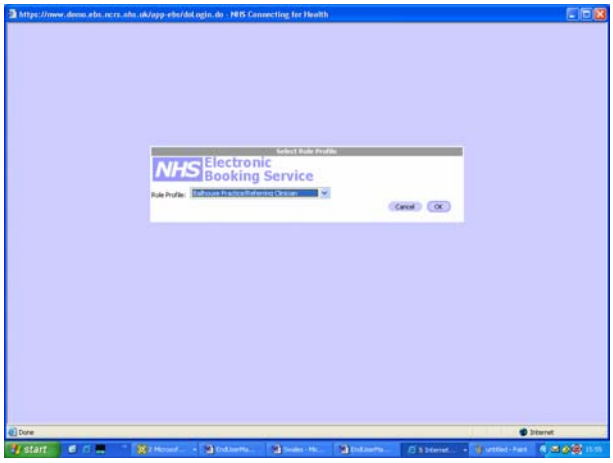
3.3. *If you do NOT have a Choose and Book icon on your desktop:*

⇒ Open Internet Explorer on your computer

⇒ In the address box of the internet screen, type in https://nww.ebs.ncrs.nhs.uk/app-ebs

⇒ Choose and Book sometimes takes a little while to check your authentication, and then the if you have one Business Function, the Choose and Book homepage will open showing you the Choose and Book business functions available to you. If you have more than one Business Function, you will see the role selection screen in Choose and Book.

⇒ You have now accessed Choose and Book using your smartcard

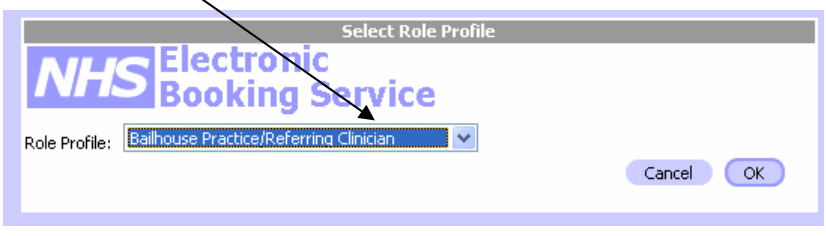


NB: Your Smartcard must remain in the smartcard reader for the whole time that you are using the system. If you pull your Smartcard out of the reader, your session will end.

3.4. *Selecting your Business Function in Choose and Book*

⇒ As a GP, within Choose and Book, you will have been given the Business Function of "**Referring Clinician**".

⇒ Select **Referring Clinician** from the pick list and click OK



⇒ Choose and Book will now load your homepage

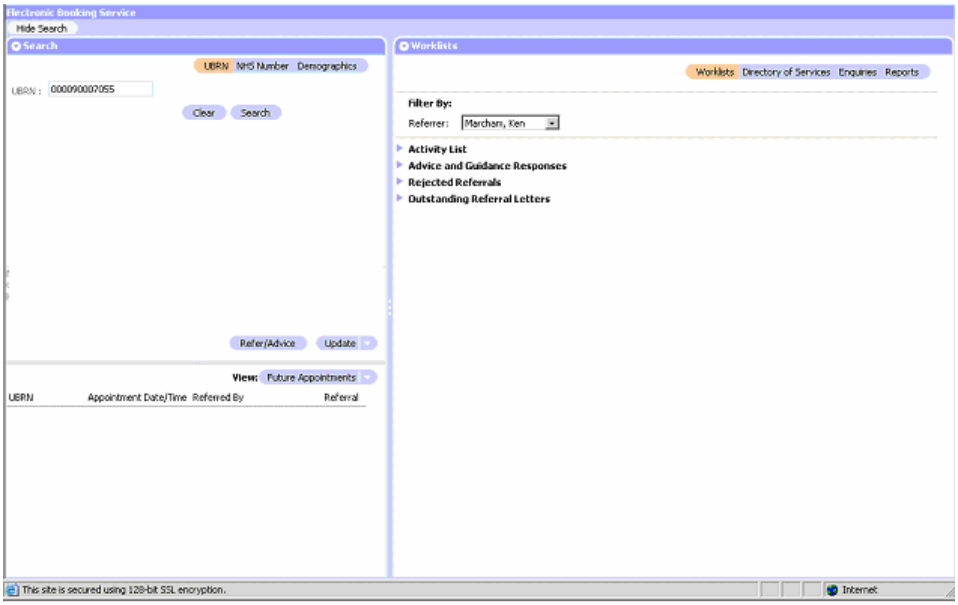
3.5. *Logging out of and Closing Choose and Book*

⇒ To log out of Choose and Book you click on Log Out near the top right of the screen

⇒ This takes you back to the selecting role screen, so if required, you can select another Choose and Book role, and go back in to the tool from here.

⇒ To exit Choose and Book completely, you need to click on the at the top right corner of the screen.

3.6. *Your Homepage*

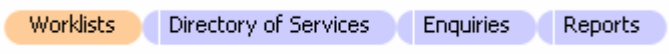


⇒ The Referring Clinician homepage has 2 main sections: **Search** (on the left) and **Worklists** (on the right).

⇒ The **Search** section is where you can search for your patient from the Patient Demographic Service (PDS) on the Spine (see section 5.2).

⇒ The **Worklists** section gives you the latest information on the patients you have initiated or completed bookings for, and is a useful tool for you to check if you have any outstanding actions (like completing your referral letter for a patient. See section 10).

⇒ You can also browse the Directory of Services by clicking on **Directory of Services** (see section 16), or you can access enquiries by clicking on **Enquiries** or you can access reports by clicking on **Reports.** (See section 17)



4 Searching for and Selecting a Patient

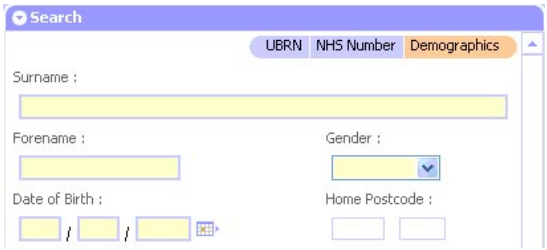
⇒ There are 3 ways that you can search for a patient; by **UBRN**, **NHS Number** or by **Demographics**.

⇒ If you know your patient's NHS Number, click on NHS Number and then enter the NHS Number in the box and click on Search. *(NB: NHS number is the fastest way of finding your patient)*

⇒ If you know your patient's Unique Booking Reference Number (UBRN) you can click on UBRN and then enter it in the box (do not enter the hyphens) and click Search

NB: The UBRN is a number generated by Choose and Book for your patient's particular appointment request.

⇒ If you do not know the NHS Number or UBRN, click on Demographics and then enter the patient's **Surname**, **Forename**, **Gender** and **Date of Birth** (Please check the spelling of forename and surname with your patient).



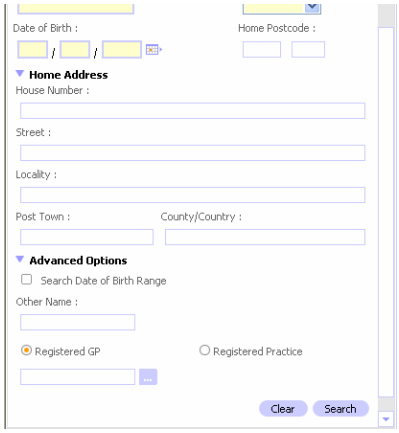
⇒ If you know it, you can also add in the patient's **Home Postcode**. Check to ensure that the postcode provided is for their *permanent* address and not that of a temporary address (e.g. temporary resident or on holiday). Check if the patient has recently moved and whether they informed their GP; if they did not inform the GP, ask for their previous address. If the postcode is not known by the patient, do not enter a default like XX99, but use the **Advanced Options**

NB: Yellow fields in Choose and Book are mandatory.

⇒ Click Search

⇒ Choose and Book will search for your patient in the PDS on the Spine.

⇒ If your patient is not found or there are more than one exact matches found in the PDS, a message in red will tell you so, and you then can enter more search criteria by clicking on either **Home Address** or **Advanced Options** and click on Search again.



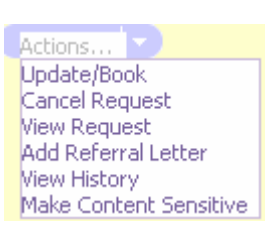
NB: for your patient to be found on the Spine, they must have an NHS Number. Patients without an NHS Number cannot be booked using Choose and Book.

NB: for CAB to display the patient, the PDS must return a single hit from the PDS, otherwise the user must enter additional search criteria until the PDS returns a single patient.

⇒ Once your patient is found, their name and NHS Number will appear at the bottom of your search section in blue.

⇒ You can see past and future appointments and advice requests that have already been booked or have taken place in Choose and Book for your patient, by clicking on **Future Appointments** or **Past Appointments** or **Advice/Appointment Requests**.

⇒ If you then click on the UBRN, and then **Actions** you can take the following actions:



5 Updating Patient Details

Patient Details are held on the Patient Demographic Service (PDS) on the Spine. It is good practice for a GP to check their patient's details held on the PDS each time you use Choose and Book, and if required to update the details with the patient.

5.1. Accessing the Update Patient Details Section

⇒ In Choose and Book, you can update specific demographic information about a patient and add a patient password.

⇒ You can access this section in 3 ways:

1. Click

, then click

2. Search for and select your patient from the Spine (see section 4)
    - Search for patient
    - Click on the NHS number
    - Click

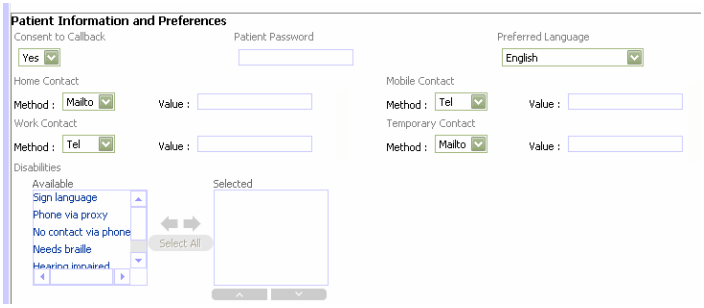
    - Select **Update Person**
3. or Click on **Update Person Details** when processing an appointment request or booking

5.2. Updating Patient Details

⇒ You are presented with the **Patient Information and Preferences** screen.

⇒ Check the patient's details (names, date of birth, GP details, and telephone contacts) with the patient.

⇒ Add or change the patient information and preferences as needed. You can insert or change the consent to call back, patient password, preferred language, home contact, mobile contact, work contact, temporary contact and disabilities.



⇒ Click Submit and the PDS will be updated

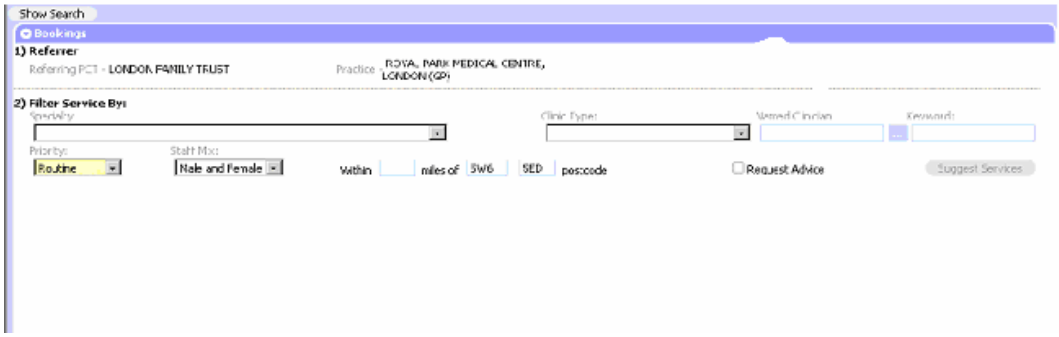
6 Searching for and Selecting Appropriate Services

6.1. Accessing the Screen to Search for Services

⇒ There are 2 ways for you to access the bookings section of Choose and Book

1. Click on Refer/Advice
2. Click on the blue NHS number of your patient, then click **Actions** then click **Refer/Advice**

⇒ You now see the main screen for initiating an appointment request.



⇒ You need to enter the criteria against which Choose and Book will search for appropriate services that your PCT has commissioned.

NB: The yellow fields are mandatory to be completed to enable a search for services.

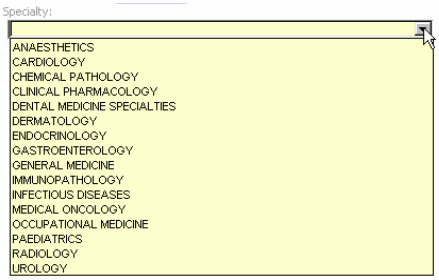
⇒ You can search for services by different means:

1. by Specialty, Clinic Type and Priority
2. by Named Clinician
3. by Keyword

NB: the above searches are not mutually exclusive; e.g. you can search by Named Clinician with Specialty, or you could search by Keyword and Named Clinician

6.2. Searching for services by Specialty, Clinic Type and Priority

⇒ Select a **Specialty** from the pick list



⇒ Once you have selected a Specialty, you can use the Service Selection Booking Guidance to help you to decide on the Clinic type and Priority (see section 6.1.1.) or you can select Clinic Type and Priority of your choice (see section 6.1.2)

6.1.1 Using Service Selection Booking Guidance

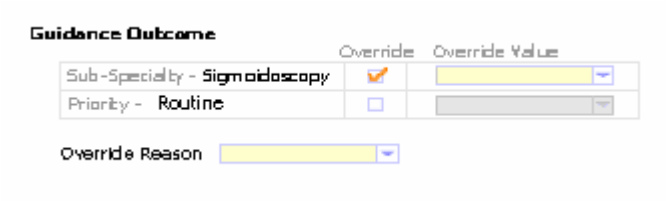
⇒ Click on

to get to the **Service Selection Booking Guidance**. This is an algorithm of questions to help you choose the most appropriate **Clinic Type** and **Priority** for your patient.

⇒ On each page of the guidance algorithm, answer the question and click Next to move on to the next page and question.

⇒ The **Service Selection Booking Guidance** will give you a recommended **Clinic Type** and **Priority** according to the answers you have given to the questions.

⇒ You can accept or reject the recommendation. If you wish to override the recommendation, click the **Override** box and select an **Override Value** and an **Override Reason** from the pick lists.



⇒ Once you have completed this screen, click on Done and you are returned to the main booking screen.

⇒ If you accepted the recommendations, the **Clinic Type** and **Priority** fields will have been automatically populated.

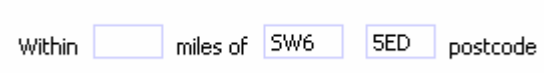
⇒ If you rejected the guidance recommendations, you should select the most appropriate **Clinic Type** and **Priority** from the pick lists.

6.1.2 Selecting Services

⇒ If you do not use the Service Selection Booking Guidance, you can select a **Clinic Type** and **Priority** of your choosing.

⇒ If your patient wishes to be seen in an all female clinic (for example), you can select this as a search criterion from the picklist of **Staff Mix** on the left side of the screen.

⇒ If your patient does not wish to travel far, you can type in the maximum number of miles the patient would wish to travel from their home postcode address.

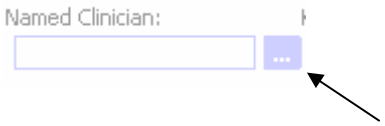


⇒ Once you have completed all the yellow mandatory fields plus any other search criteria your patient wishes, click on Suggest Services

⇒ Choose and Book will search the Directory of Services for those services that meet your search criteria that have been commissioned by your PCT.

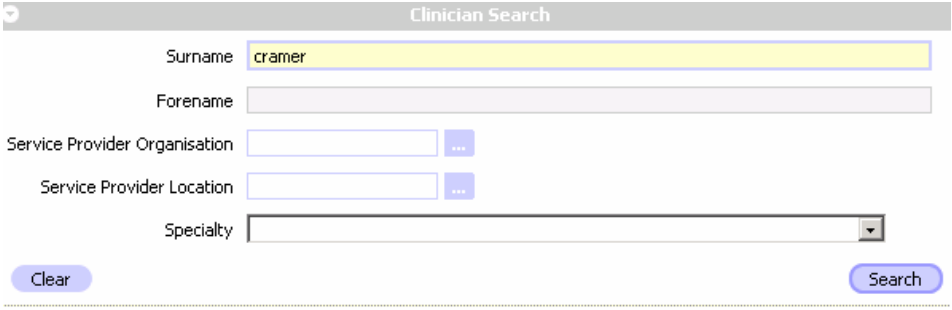
6.3. Searching for services by Named Clinician

Using the Named Clinician search in Choose and Book means that you can search for services that are delivered by a particular Named Clinician. However, your targeted Clinician will only show for those services that have made him/her a Named Clinician when loading the Directory of Services.



⇒ To search for those services of a particular Named Clinician, you will first need to search for your Named Clinician. Click on the purple box to the right of the **Named Clinician** field.

⇒ Enter the **Surname** of the desired Clinician you wish to find, and enter any further details if you wish to limit the search findings (e.g. forename, organisation or location or specialty)



⇒ Click on Search

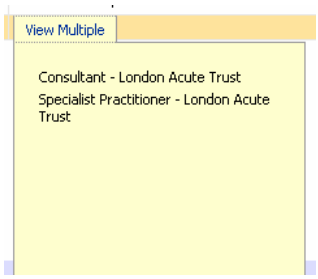
⇒ Choose and Book now shows you all the Named Clinicians in the system that meet your search criteria.

⇒ You are given the full name of the Clinicians and their role and locations that are in the Directory of Services (DOS). You can see in the picture that Justin Cramer is a Named Clinician for a service or services only at the Royal Acute Trust.

⇒ However, Richard Cramer is recorded as View Multiple . This means that Richard Cramer is Named Clinician for more than one service in more than one location

⇒ To view the details of a named clinician, click on their name in blue, and you will see their details. Click on the name in blue again to close the window.

⇒ If you click on View Multiple, you will see the variety of services for that named clinician.



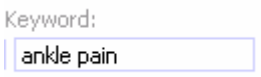
⇒ To select one of the Clinicians, click on their row to highlight them in orange

⇒ Click Done

⇒ You will now see the name of the Named Clinician that you have selected in the **Named Clinician** field in the main screen.

6.4. Searching for services by Keyword

⇒ You can also search for services by **Keywords** to the right of your screen.



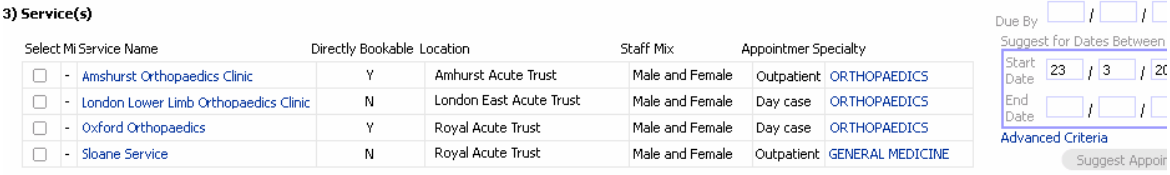
⇒ You can type in a full keyword relating to the condition of your patient, or you may enter part of a word.

⇒ It is recommended that you select a Specialty as well as entering a keyword, to limit the results to your search.

⇒ Click Suggest Services to see which services your PCT has commissioned that have your keyword in its DOS entry

6.5. Selecting Appropriate Services for your Patient's Needs

You will now see the services available for your patient to choose from.



⇒ You can get more detailed information about each of the services offered by clicking on the name of a service which is in blue, and Choose and Book will display for you the full

information that is recorded in the Directory of Services on that service. This is your opportunity to check that the choices you will offer your patient are clinically appropriate to their particular needs.

⇒ Once you have read the service information, you can select either one or several of the services for your patient, by clicking in the box to the left of the service name

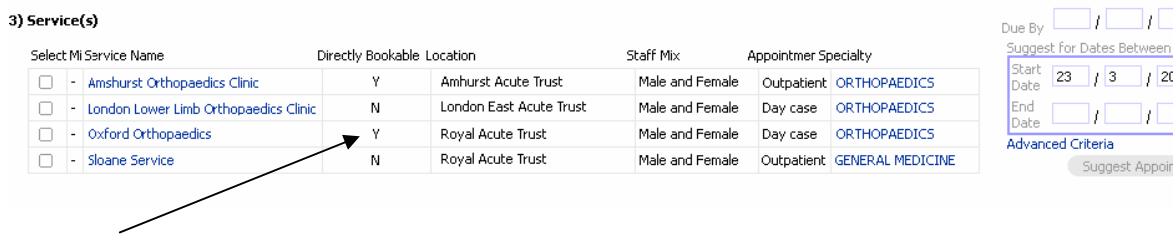
NB: If you only select one option at this stage, your patient will only have that one option available to them if they call the Choose and Book Appointments Line (CABAL) to make a booking later on. So, if your patient wants to go home to discuss the options with their family, you should tick all the clinically relevant options at this stage to keep all those choices open to the patient when they contact the CABAL later.

⇒ If, at this stage you decide not to proceed with an appointment request, click Don't Submit

⇒ You return to your Homepage, where you can either click on Actions again to proceed with another search for service, or you can search for another patient.

6.6. Directly and Indirectly Bookable Services

The columns of services show the **Service Name**, **Directly Bookable** and **Location**.

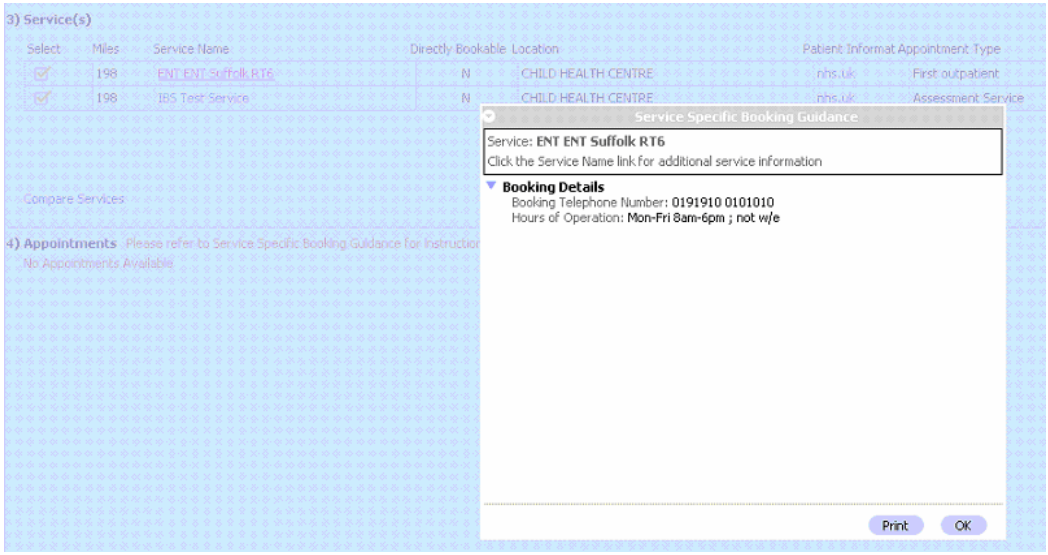


⇒ A **Y** in the Directly Bookable column means that a service is a **Directly Bookable Service** (DBS) (i.e. you can book your patient for an appointment in the service provider's PAS electronically using Choose and Book).

⇒ An **N** in the Directly Bookable column means that a service is an **Indirectly Bookable Service** (IBS) (i.e. you cannot directly book your patient in for an appointment in that service provider's PAS electronically, but you can complete an appointment request for that service, and the patient will then need to call the IBS call centre).

⇒ You can view the Booking Details of an IBS by clicking on the Service name (in blue).

⇒ Click on Booking Details to reveal the detailed information about the hours of opening and the telephone number of the IBS call centre.



⇒ You can print off this information if you wish, by clicking Print

⇒ Click **OK** to return to the main bookings screen

⇒ The **Location** column tells you what site or location that service is held at.

⇒ You can shortlist and select a mix of both Directly and Indirectly Bookable Services for your patient.

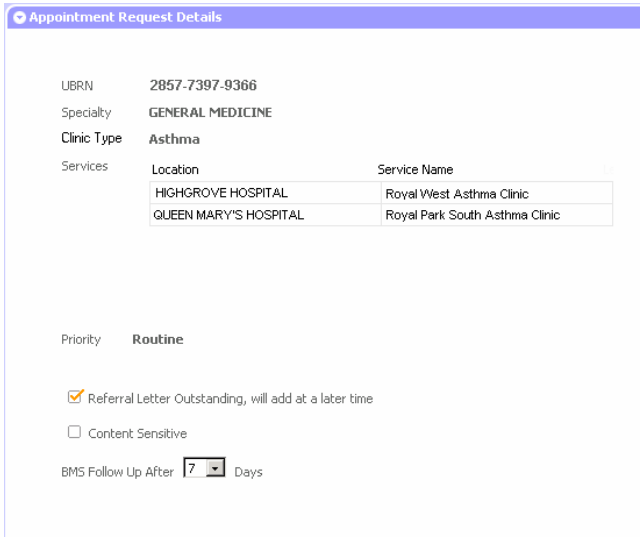
7 Making an Appointment Request When a Patient Wishes to Make a Booking Later and Printing a Summary

The GP does not have to complete a booking at this stage but can instead complete the appointment request; if your patient wants to go home and think about where and when they would like to be seen at the hospital and call the Call Centre, or if you wish your practice admin staff to complete the booking, you can simply print off an appointment request summary at this stage and give it to the patient.

7.1. Completing an Appointment Request and Printing a Summary for your Patient

⇒ Having shortlisted the appropriate service(s) for your patient (see section 6), click on Request near the bottom right hand corner of your screen to complete an Appointment Request.

⇒ You see a summary of the options selected plus the patient's details. You may have either directly or indirectly bookable services selected, or a mixture and they will all be listed here.



⇒ The **Referral Letter Outstanding** field is automatically ticked if the services you are making a request for require a referral letter, and you cannot change that if the service requires a referral letter to review.

⇒ You have the option to tick the **Content Sensitive** box. Making an appointment request Content Sensitive restricts who can see any information about this appointment request. This means that in the referring practice, only the referrer in person can view any information at all about this particular appointment request. All staff in the associated workgroups within the service provider you are referring to, will be able to view information about that appointment and referral. The BMS will NOT be able to view any information, so if you

make a request Content Sensitive, the patient cannot call the BMS to complete their booking. If you make an appointment request Content Sensitive by ticking the box, you must remember that only you will be able to view anything about that appointment request within your practice, which may not be appropriate if you are not due to be available in the near future within that practice.

⇒ In the **BMS Follow Up** field, select the maximum numbers of days by when you want your patient to have been in touch with the Choose and Book Appointments Line (CABAL) or practice or the IBS call centre or the internet to make the booking. (This is useful to make sure your patient does actually make a booking for your referral). If your patient has not made the booking within the number of days you specified, the BMS staff at the CABAL is notified in Choose and Book, so they can send a reminder to the patient to complete the booking process.

⇒ Click on Submit to apply the appointment request

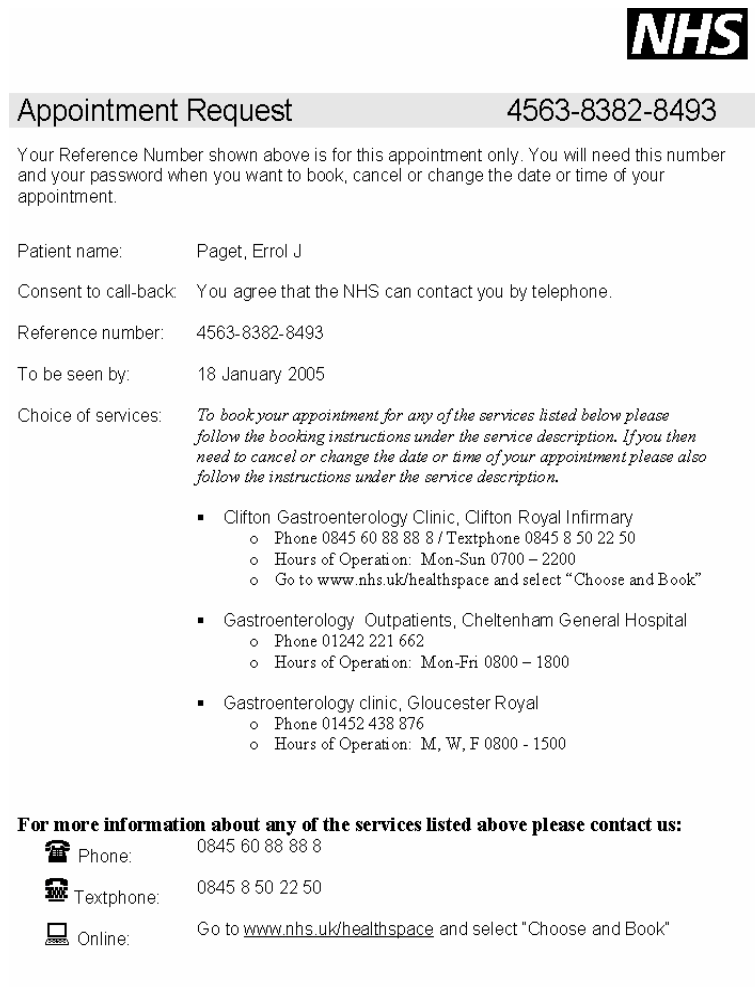
⇒ You now see the summary with 3 options: **Update Person**, **Add Referral Letter** or **Print**

⇒ Click **Update Person** - You can update your patient's details on the Spine, including changing the automatically set patient password in their record (see section 5).

⇒ Click **Add Referral Letter** - You can attach your referral letter in Choose and Book (see section 10)

⇒ To print off a summary of the Appointment Request and your patient's password click Print. You then have the option to print just the Appointment Request summary, or the Appointment Request Summary and the Patient Password. Click on the option you wish. The Appointment Request printout includes the telephone number of the CABAL, where the patient can complete their booking for the directly bookable services, and the telephone numbers and booking details of each of the indirectly bookable services (IBS) you have selected with the patient.

NB: If you do not set a password with your patient before they leave the practice, they will not be able to complete or change their booking with the CABAL, or the IBS Call Centre or on the Internet.



NHS

Appointment Request 4563-8382-8493

Your Reference Number shown above is for this appointment only. You will need this number and your password when you want to book, cancel or change the date or time of your appointment.

Patient name: Paget, Errol J

Consent to call-back: You agree that the NHS can contact you by telephone.

Reference number: 4563-8382-8493

To be seen by: 18 January 2005

Choice of services: *To book your appointment for any of the services listed below please follow the booking instructions under the service description. If you then need to cancel or change the date or time of your appointment please also follow the instructions under the service description.*

- Clifton Gastroenterology Clinic, Clifton Royal Infirmary
  - Phone 0845 60 88 88 8 / Textphone 0845 8 50 22 50
  - Hours of Operation: Mon-Sun 0700 – 2200
  - Go to www.nhs.uk/healthspace and select "Choose and Book"
- Gastroenterology Outpatients, Cheltenham General Hospital
  - Phone 01242 221 662
  - Hours of Operation: Mon-Fri 0800 – 1800
- Gastroenterology clinic, Gloucester Royal
  - Phone 01452 438 876
  - Hours of Operation: M, W, F 0800 - 1500

For more information about any of the services listed above please contact us:

Phone: 0845 60 88 88 8

Textphone: 0845 8 50 22 50

Online: Go to www.nhs.uk/healthspace and select "Choose and Book"

⇒ The patient can then either take that printout to your practice admin team, or they can call the IBS Call Centre (for an IBS) or the CABAL or they can access the internet at www.nhs.uk/healthspace (for a DBS) later to complete their booking.

⇒ Once you have printed off the summary, you are returned to the summary screen, where you can again either **Update Person** (see section 5) or **Add Referral Letter** (see section 10.1) or **Close**.

⇒ At this stage you can finish your Choose and Book actions by clicking on Close and you can then come back later to attach your referral letter.

8 Making an Appointment Booking

If you and your patient wish, you can immediately complete the booking of when and where the patient is seen, for directly bookable services only.

⇒ You will have first selected appropriate services for your patient (see section 6)

⇒ Before asking Choose and Book to find available appointments for the service(s) you have selected, you can limit the search by filling in the date range of when your patient should or wishes to be seen.

⇒ The **Due By** date is the latest date by when you want your patient to be seen at the hospital.

⇒ The **Start Date** (defaulted to the current date) and **End Date** are the dates within which you want to view available appointment slots for your patient to be seen at the hospital.

⇒ Click on Suggest Appointments and Choose and Book will display in chronological order all the appointment slots for all your selected services within the date ranges you have specified

4) Appointments
Select
Appointment Date/Time
Service Name
Location
Lead Professional
Diary View:
Day Week Month
08:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
08:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -
09:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
09:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -
10:00 Fri 17/09/2004 Liverpool Service Royal Aeriel Hospital Harris, Rita
10:00 Fri 17/09/2004 HP's Hospitalt Royal Aeriel Hospital -

⇒ You can use the scroll bar to see up to 50 appointments currently available. (You can click the **Next** button to see the next 50, and **Back** to see the previous 50).

⇒ You can change the view by clicking on Week or Month

⇒ Select one appointment of the patient's choice by clicking on the round radio button to the left of the chosen date and time

⇒ Click Book. (NB: Don't click Request at this point as this will not book the appointment in the selected slot, it will just create an appointment request)

⇒ Review the appointment details

⇒ If the details are correct, click Submit and Choose and Book will check with the PAS real-

time to see if that slot is still available.

⇒ If the communication between Choose and Book and the PAS fails or if the slot is no longer available in the PAS, you will get a message telling you so. Repeat the booking process as above.

⇒ If the booking details are not correct, click Don't Submit to go back to the previous screen

⇒ To print off the Appointment Summary and your patient's password click Print. You then have the option to print just the Appointment Summary, or the Appointment Summary and the Patient Password. Click on the option you wish. The Appointment Summary printout includes the telephone number of the CABAL, where the patient can change their appointment.

⇒ Click Print and then select the printer you want to print to

⇒ Click

⇒ Click Close to close the Print Appointment Confirmation screen

⇒ Click Close to close the Appointment Summary screen

⇒ You have now made a booking for your patient and printed off for them a summary of their appointment made.

NB: Tell the patient that the hospital will send the patient a clinic letter to confirm their appointment and give them more details about how to get to the room where the clinic is being held, as the hospital still needs to accept the referral and booking.

9 Advice and Guidance Requests

'Advice and Guidance' is an electronic one-question-one-answer conversation between a Referrer and a Service Provider Clinician that deals with a patient's medical information.

Instead of progressing with an appointment request or booking, you can select a service, and then ask the provider Clinician team from that selected service for advice and guidance about your patient or your possible referral.

There are 2 ways to access the Advice and Guidance part of Choose and Book:

1. Click on Refer/Advice

2. Search for and find your patient, and then click on their NHS number in blue, then click Actions then click **Refer/Advice**

9.1. How to Request Advice and Guidance

⇒ You are now at the main bookings screen

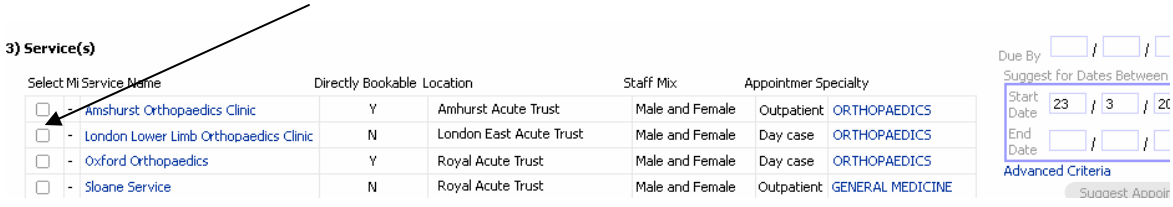
⇒ Select a **Specialty**, then **Clinic Type** and **Priority**, or use the **Access Service Selection**, or use the **Named Clinician** or **Keyword** search to search for appropriate services (see section 6)

⇒ Click Request Advice. To show that you wish to search for those services willing to respond to your request for advice and guidance

⇒ Click Suggest Services

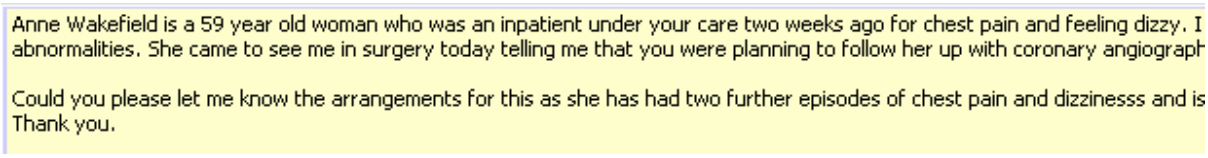
⇒ Those services that your PCT has commissioned, meeting your selection criteria *and* that have agreed to respond to advice and guidance requests are displayed (i.e. the list will not show those services that have not agreed to respond to advice and guidance requests)

⇒ Select a single service by clicking the tick box in front of that service



⇒ Click Request

⇒ Type your request for advice and guidance in the yellow box


Anne Wakefield is a 59 year old woman who was an inpatient under your care two weeks ago for chest pain and feeling dizzy. I
abnormalities. She came to see me in surgery today telling me that you were planning to follow her up with coronary angiograph
Could you please let me know the arrangements for this as she has had two further episodes of chest pain and dizzinesss and is
Thank you.

⇒ Click Submit

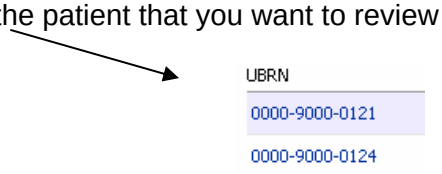
⇒ You now have the option to print off your advice and guidance request if you wish, by clicking on Print then selecting your printer from your print box

⇒ Click Close

9.2. How to View Advice and Guidance Responses

⇒ On your worklist screen, click on **Advice and Guidance Reponses**

⇒ Click the **UBRN** of the patient that you want to review a response from



⇒ Click Actions and select **View Advice Request**

⇒ Read the response then click Close

NB: The UBRN will remain in your Advice and Guidance Responses worklist for 6 months, or until you remove it from your worklist (see section 9).

9.3. How to Convert an Advice and Guidance Response into a Booking

⇒ From your worklist screen, open the **Advice and Guidance Reponses** worklist

⇒ Click the **UBRN** of the response you wish to review and progress

⇒ Click Actions and select **Update Advice Request**

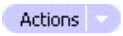
⇒ This now takes you to the Booking Screen where you can select more services if you wish, then click on Request or Suggest Appointments to progress the booking

⇒ Complete the appointment request process or booking process as in sections 7 and 8

9.4. How to Remove an Advice and Guidance Response from your Worklist

⇒ From your worklist screen, open the **Advice and Guidance Reponses** worklist

⇒ Click the **UBRN** of the response you wish to remove from your worklist.

⇒ Click 

and select **Close Advice Request**

⇒ This will remove the response from your worklist.

10 How to Create and Send an Electronic Referral Letter

NB: To create and send a referral letter you must have completed an appointment request, but you do not have to have made a booking of date and time.

Before you can send a referral letter in Choose and Book, you must first create the referral letter on your computer and save it, so you can attach it in Choose and Book.

Check with your GP System Supplier for how you should save your electronic referral letters in your GP system, or decide where you will save any MS Word letters you have written.

10.1. Getting to the Referral Letter Section

⇒ There are several ways that you can get to the Referral Letter section of Choose and Book:

- Directly from the appointment summary or booking summary screen by clicking on Add Referral Letter
- Or from your worklist of **Outstanding Referral Letters**
- Or by searching for and finding your patient and viewing their appointment history (see below)

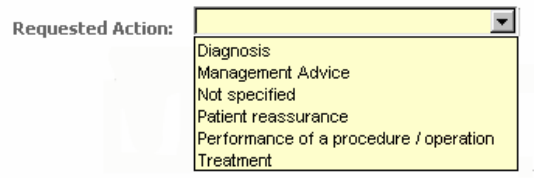
⇒ Click the UBRN of your patient for the appointment or appointment request already made.

⇒ Click Actions and select **Add Referral Letter**

⇒ You are now in the Referral Letter screen.

10.2. Sending a Referral Letter

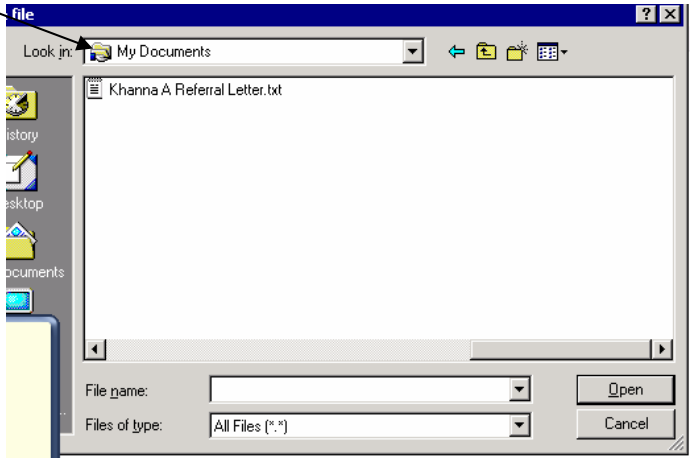
⇒ From the **Requested Action** pick list, select the action you would like of the consultant you are referring to



⇒ Click Attachments. You now see a box where you will need to browse for and select your referral letter as an attachment

⇒ Click Browse... to search for the file on your computer

⇒ Pick the correct directory and folder where your referral letter is saved in the **Look in** box

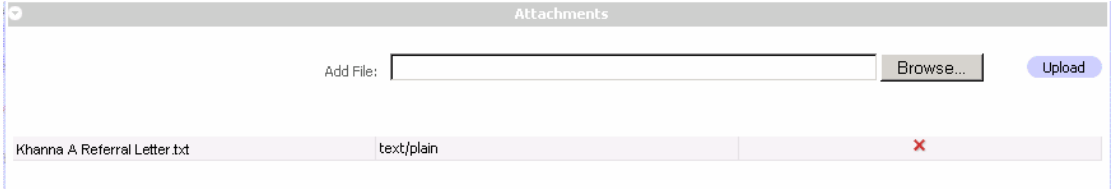


⇒ Click on the desired file to highlight it and click Open

⇒ Choose and Book shows you the file you have selected.

⇒ Click Upload to add the file to the **Attachments** list.

⇒ You can add more files at this stage if you wish to have more than one attachment sent as the referral (e.g. add scan results etc.)



⇒ Click Submit to add the file(s) to the e-referral letter message

⇒ Click Submit to save the referral letter attachments in Choose and Book ready for the Hospital Consultant to review

⇒ Click Close to close the Referral Letter Summary screen

11 How to Update Your Referral Letter for Directly Bookable Services

NB: You can update and change the attachments you have sent as referral letters once you have submitted the original for Directly Bookable Services up until the freeze time is reached, and for IBS up until the referral is accepted. Each time you change the referral letter attachments and resend them, they will appear in the Hospital Clinician's worklist for them to review once again.

⇒ You will first need to update and change the referral letter or other such files and resave them on your computer.

⇒ To attach the revised referral attachments, you start by searching for the patient.

⇒ Once the patient is found, click the **UBRN** for the appointment or appointment request

⇒ Click Actions and select **Modify Referral Letter**

⇒ Click Attachments and then Browse... . Select the new attachment(s) you wish to submit with your referral.

⇒ Click Submit to add the file(s) to the referral letter.

⇒ Click Submit to save the referral letter attachments in Choose and Book ready for the Hospital Consultant to review.

⇒ Click Close to close the Referral Letter Summary screen.

NB: If the referral letter is "frozen", meaning that the referral attachments cannot be updated because it is too close to the time of the appointment, Choose and Book notifies you. In this situation you should contact the service provider directly with the new information.

12 Reviewing Worklists

When using Choose and Book, you can review the progress of your patients in the booking process by reviewing your worklists.

There are 4 worklists for a GP (referring clinician):

- Activity List
- Advice and Guidance Responses
- Rejected Referrals
- Outstanding Referral Letters

⇒ You can now filter the patients you see in your worklists, by selecting your name from the pick list of clinicians, to view only those patients within your practice that you have referred. If you do not filter your worklists by Clinician, you will see all patients from your practice that have been referred via Choose and Book.

⇒ To open one of the worklists, click on the blue triangle next to the worklist you wish to view, or click on the word (e.g. Activity List)

12.1. Activity List

You can see for those patients referred and/or booked by your practice where they are in the system.

UBRN	The patient's Unique Booking Reference Number
Booked (Y/N)	This tells you if your patient has or has not booked their appointment yet
Referral Status	The status of the referral including the Advice and Guidance status
Submitted Date	Date the appointment request was submitted
Referrer	The name of the referrer
Named Clinician	Name of the Clinician to whom the patient is being referred
Patient Name	The name of the patient with that UBRN

Last Activity Date	When the last activity was completed on this UBRN by any user

⇒ Click on the Unique Booking Reference Number (**UBRN**) of the patient you wish to review

⇒ Click on Actions and select the task you want to perform (e.g. view history or cancel an appointment etc)

⇒ You then proceed with the action you have selected

12.2. Advice and Guidance Responses

⇒ You can see the responses for any requests for Advice and Guidance that you have requested from a hospital clinician team.

UBRN	The patient's Unique Booking Reference Number
Priority	Tells you the priority with which your request was sent
Submitted Date	Date the appointment request was submitted
Response Date	The date that the A&G request was responded to by the Hospital Clinician
Referrer	The name of the referring clinician who sent the advice request
Service Name	The name of the service that the advice request was sent to

Specialty	The name of the specialty
Clinic Type	The name of the clinic type
Patient Name	The name of the patient for whom the advice request was sent

⇒ Click on the Unique Booking Reference Number (UBRN) of the patient you wish to review the response for.

12.3. Rejected Referrals

⇒ You can see any referrals that have been rejected by the hospital you tried to book your patient in to.

UBRN	The Unique Booking Reference Number of the patient whose referral was rejected
NHS	NHS number of the patient whose referral was rejected
Submitted Date	The date the referral was submitted
Service Override	Was the service selection booking guidance recommendation overridden by the referrer for that referral?
Rejection Reason	Reason why the referral was rejected
Location	The location of the service for the referral
Referrer	Name of the referrer
Patient name	Name of the patient referred

NB: Any patients in this list will need to be contacted by your practice to inform them that their booking is now cancelled, and they will need to be re-booked or re-referred. The hospital will not be contacting any patients for whom they have rejected the referrals for.

12.4. Outstanding Referral Letters

⇒ You can see if there are any patients that have bookings, for whom you have not written/sent a referral letter.

NB: Until you send a referral letter, the hospital will have no information about your patient to review.

UBRN	The Unique Booking Reference Number of the patient whose referral was rejected
NHS	NHS number of the patient whose referral was rejected
Submitted Date	The date the referral was submitted
Service Override	Was the service selection booking guidance recommendation overridden by the referrer for that referral?
Location	The location of the service for the referral
Referrer	Name of the referrer
Lead Time	The closing date by when you need to have sent a referral letter
Patient name	Name of the patient referred

⇒ Click on the Unique Booking Reference Number (**UBRN**) of the patient you wish to write the referral letter for

⇒ Click Add Referral Letter

⇒ Complete the referral letter as in section 10

13 How to Cancel or Change an Appointment Request

⇒ You first need to find your patient and their current appointment booking.

⇒ On your Homepage, there are two ways to find the patient and the appointment booking you are wanting to cancel or change:

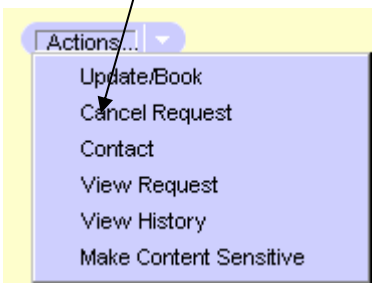
⇒ Either **search** for the patient by their UBRN, NHS Number or demographics (see section 4).

⇒ Or click on **Activity** in the Worklist section

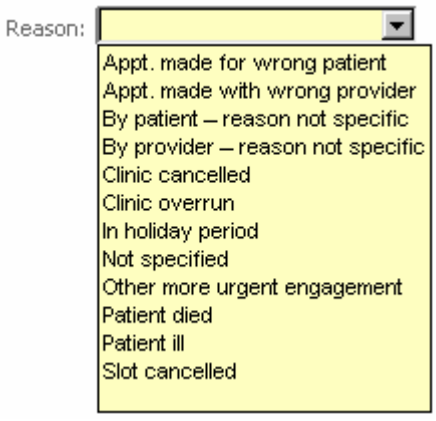
13.1. How to Cancel an Appointment Request

⇒ Click the UBRN for the appointment request.

⇒ Click Actions and select **Cancel Request**

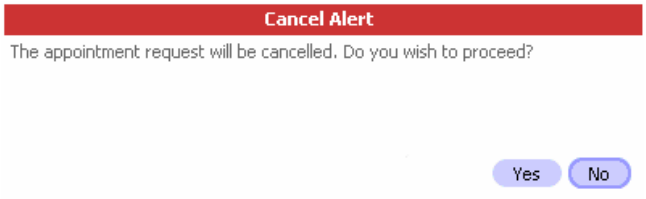


⇒ Select a cancel **Reason**



⇒ Click Cancel Request

⇒ The system warns you that you are about to cancel an appointment



⇒ Click Yes if you are sure you wish to cancel the appointment request.

⇒ Click Close

13.2. How to Change or Update an Appointment Request

⇒ Click the UBRN for the appointment request

⇒ Click Actions and select **Update/Book**

⇒ You now see the main booking screen where you can change the criteria of your search for services and search for and select different services that are appropriate to your patient (see section 6)

⇒ Progress with an appointment request (see section 7)

14 Changing or Cancelling an Appointment Booking for Directly Bookable services

Remember that to be able to cancel or change a booking, the appointment must have already been booked as a directly bookable appointment (any IBS appointments must be cancelled with the IBS call centre).

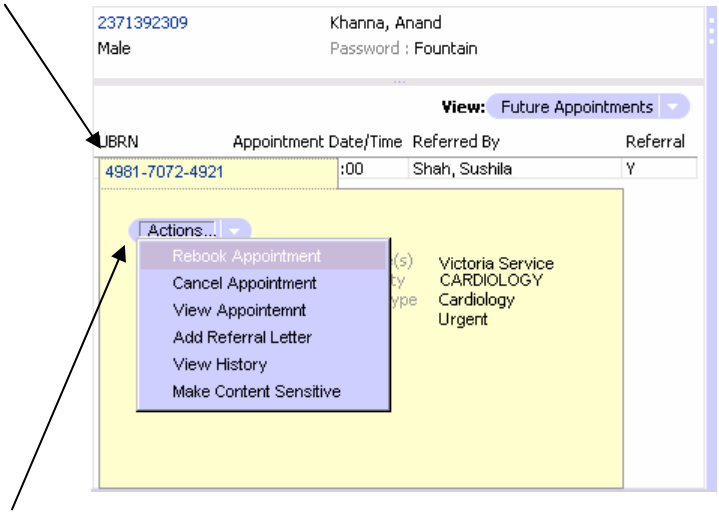
You first need to find your patient and their current appointment booking.

On your Homepage, there are two ways to find the patient and the appointment booking you are wanting to cancel or change:

- Either **Search** for the patient by their UBRN, NHS Number or demographics
- Or click on **Activity** in the Worklist section

14.1. How to Change an Appointment Booking

⇒ Click the patient's **UBRN** for the appointment that you wish to change. You will be effectively canceling the appointment already made, and rebooking for a new appointment in Choose and Book.



⇒ Click Actions and select **Rebook Appointment**. Rebook effectively means you are canceling the old booking and rebooking a new appointment

⇒ You now see the services that the patient can rebook in to on the main booking screen. This reveals only those services that you have previously selected when you initiated the original appointment request or booking. Click Suggest Appointments

⇒ You now see the appointment slots for you to choose from with the patient. Continue to make the new booking as in section 8.

⇒ Choose and Book will cancel the old appointment booking automatically when you make the new booking.

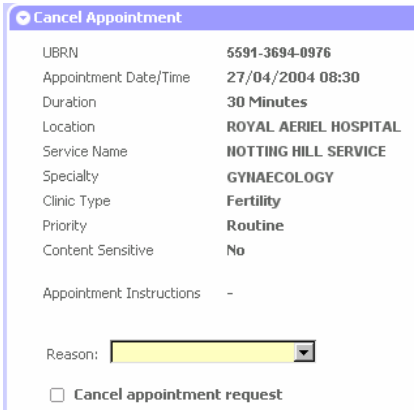
14.2. How to Cancel an Appointment Booking for Directly Bookable Services

NB: The GP in the surgery can only cancel an appointment for a Directly Bookable Service, as IBS services cannot be cancelled electronically via Choose and Book. If you want to cancel an IBS-booked appointment, you will need to contact the IBS service to ensure that that appointment is cancelled in the IBS's Hospital PAS.

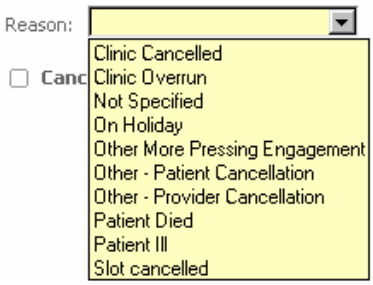
⇒ Click the patient's **UBRN** for the appointment that you wish to cancel

⇒ Click Actions and select **Cancel Appointment**

⇒ Choose and Book shows you the Cancel Appointment screen, which displays the details of the appointment already made.



⇒ Select a **Reason** for you canceling the appointment from the picklist (NB: this is a yellow field so is mandatory)



⇒ You can either cancel just this appointment so that you or the patient can make a new appointment later, or you can also cancel the appointment request at this stage if you want to cancel the whole referral.

⇒ If you wish to cancel both the appointment booking and the Appointment Request, click on the box next to **Cancel Appointment Request** to put a tick in the box

⇒ If you wish to just cancel the appointment booking, do not put a tick in the box

⇒ Click Cancel Appointment

⇒ Choose and Book gives you a warning message to confirm the action you are about to take. Click Yes

15 Manage Rejected Referrals

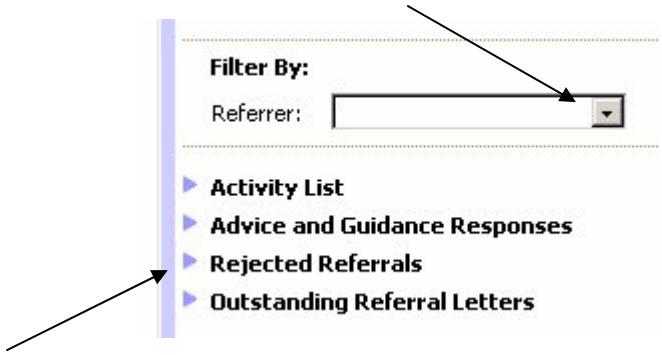
Once you have sent a referral letter in Choose and Book and the patient has had a booking made, the booking and letter can be reviewed by the hospital. The hospital clinical team can then accept or reject your referral. If they accept the referral and booking, you need take no further action.

If however, the hospital rejects your referral and booking, you will need to contact the patient to ensure they do not go to the hospital and to progress their care further if required.

15.1. Finding a Rejected Referral

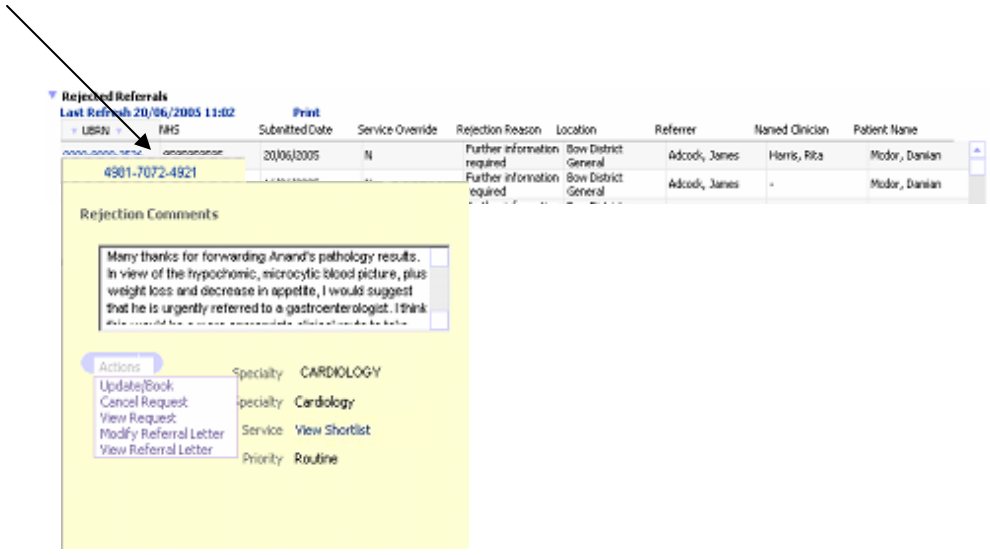
⇒ From your homepage, click on the Worklists to see your worklists

⇒ You can select your own name from the picklist of Referrers, so you only see those patients you have personally initiated an appointment request for, or who you have made a booking for. Click on the pick list and select your name.



⇒ Click on Rejected Referrals to reveal your worklist of any referrals that have been rejected.

⇒ Click on the UBRN of the rejected referral and you can read the explanation of why the referral was rejected, from the hospital clinician.



⇒ If you click on Actions, you can then select whichever action you wish to take with your patient (e.g. to change the appointment request click on **Update/Book**; to cancel the whole referral click on **Cancel Request**; to update your referral letter click on **Modify Referral Letter** etc.)

⇒ You can close the worklist by clicking on the **UBRN** and then clicking on **Rejected Referrals**.

16 Browse the Directory of Services (DOS)

The Directory of Services (DOS) is the repository of all information about services that can be booked via Choose and Book. You can browse all the services loaded in the DOS, regardless of whether they are commissioned by your PCT, without initiating any appointment requests or bookings.

⇒ From your homepage, click Directory of Services

⇒ You can now select particular search criteria and then ask Choose and Book to search for and show you all services within the DOS that meet your search criteria.

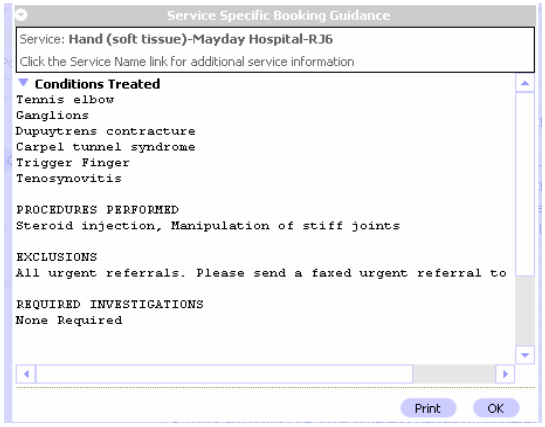
⇒ You can search for services by **Specialty**, or **Services** or **Keyword.**

⇒ Click Search

⇒ You now see <u>all</u> the services loaded in the DOS that meet your search criteria (not just those your own PCT has commissioned)

⇒ Click on the **Service Names** (in blue) to give you the detailed information loaded in the DOS for that service. Use the scroll bars on the right and to the bottom of the view to see all services relevant to your search.

⇒ Click on the emboldened subheadings to see the information about this service



⇒ You can print the information by clicking on Print

⇒ Click OK to return to the list of DOS services

17 Review Reports and Enquiries

17.1. Reports

There are reports available to the GP in Choose and Book. Reports are pre-defined sets of information for a pre-set period of time. The pre-set period of time for reports is a calendar month and they are generated retrospectively.

⇒ To access the reports available for GPs, click on Reports on your homepage, and then select the report you wish to view

⇒ Click on Print to print off the report you are viewing

⇒ Click on Close to return to your homepage

17.2. Enquiries

An Enquiry is similar to a report with pre-defined information, but you can define your own 28 day time period for an enquiry. The day you run an enquiry will provide data for the previous 28 days.

⇒ To access the enquiries available to GPs, click on Enquiries on your homepage

⇒ From the pick list of enquiries, select type of enquiry you wish to view

⇒ You can print off your enquiry by clicking on Print

⇒ Click on Close to return to your homepage